

TEMPLATES AND ANNEXES

Templates

Prospective Education Agent Questionnaire

Date received _____

Education agent details

Company Name _____

Other registered business name
(if applicable) _____

Company
registration number _____

Company Owner
(for contract) _____

Title/Position _____

Main business address
(for contract) _____

Phone: _____ Email _____

Alternative
contact name _____

Title/Position _____

Phone _____ Email _____

Details of branch offices

City	Country	Date established	Number of staff
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Add more as required _____

Details of branch offices Countries represented UK Ireland Australia Canada New Zealand USA

Others (please specify) _____

Students recruited from [country 1] to UK

Schools	EFL	College/ Vocational	Foundation
Undergraduate	Postgraduate taught	Research	Others (please specify)

Students recruited from [country 2] to UK

Schools	EFL	College/ Vocational	Foundation
Undergraduate	Postgraduate taught	Research	Others (please specify)

Please list contractual relationships with UK providers

Provider Name	Years Contracted	Students recruited
_____	_____	_____
Provider Name	Years Contracted	Students recruited
_____	_____	_____

Visa success rates for UK by country of submission. 2021 _____ 2020 _____ 2019 _____

Staff expertise

Staff Name	Date certified	Office Location
_____	_____	_____
Staff Name	Date certified	Office Location
_____	_____	_____

Staff expertise (continued)

Other notable UK focussed training – describe the training, the delivering authority and the office location of staff that participated.

Average years of experience of consultants <2 years 2 to 4 years >5 years

Describe how staff have been trained to understand the National Code of Ethical Practice for UK Education Agents?

Has your education agency been found in breach of any of the Standards in the National Code? YES NO

If yes, what corrective action have you taken?

Marketing practice

Describe recent campaigns you have executed including the target audience, the channels used, the key messages and the return on investment. Provide examples of marketing activity, eg screenshots or photographs.

Provide links to your social media accounts

Government and institutional links and memberships

Government Links: YES NO If yes, please provide details (e.g. liaising with Government to assist strengthening of the education industry, industry training, special approval/support from local government)

Institute Links: Do you have links with providers in your areas e.g. accommodation providers, training delivery, EFL or other curriculum?

YES NO If yes, please provide details

Memberships: Please indicate which relevant organisations you are registered with.

Working with

Why does your company wish to become an education agent for the above provider?

How do we fit into your portfolio of provider clients?

Which courses are of interest and why?

What are your realistic student recruitment projections for the above provider?

Year One	Applications _____	Year Two	Applications _____	Year Three	Applications _____
	Enrolments _____		Enrolments _____		Enrolments _____

What support do you need from us to be successful?

How would you position the above provider in the markets in which your company operates?

Note: you may be asked to submit a marketing campaign proposal

What are your organisational values and how do they align with the above provider?

Student quality and experience

Do you have a documented process for managing student complaints? YES NO

If yes, please provide details.

If no, how do you handle complaints?

How do you ensure the quality of experience for students being counselled by your staff?

References and additional documents

Please provide the details of two providers and two enrolled student referees who have consented to be your referees.

Provider Referee

Title	Name	Position	Provider Name
Email		Years working together	Phone

Provider Referee

Title	Name	Position	Provider Name
Email		Years working together	Phone

Student Referee

Title	Name	Provider Name	
Email		Year student used the services of your agency	Phone

Student Referee

Title	Name	Provider Name	
Email		Year student used the services of your agency	Phone

Please provide evidence of your company's financial solvency

Declaration

I/we declare that the information provided is true and correct to the best of our knowledge and that we have written consent to put forward our referees.

Signature

Name

Date Signed

Education Agent Reference Proforma

Thank you very much for taking time to complete this education agent reference check. Please can you complete all sections including providing some commentary, and return the form to:

Your Name	Your Email	Your Phone
Education Agent Name	Name of Referee's Institution	
Referee's Name	Referee's Position	Referee's Phone
In which areas/countries/regions does your provider work with this education agent?	How long has your provider been working with this education agent?	

Please comment on the education agent's performance in terms of:

Student quality:	<input type="checkbox"/> Excellent	<input type="checkbox"/> Very good	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
Student quantity:	<input type="checkbox"/> Excellent	<input type="checkbox"/> Very good	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
Application to offer conversion rate:	<input type="checkbox"/> Excellent	<input type="checkbox"/> Very good	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
Visa conversion rate:	<input type="checkbox"/> Excellent	<input type="checkbox"/> Very good	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor

Please comment below:

How would you rate this education agent's efforts to comply with the Standards laid out in the National Code of Ethical Practice for UK Education Agents?

<input type="checkbox"/> Excellent	<input type="checkbox"/> Very good	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor
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Have you received any feedback from students regarding this education agent, and if so what are they reporting?

In your opinion, what could this education agent do better?

Are there any other comments or additional information you would like to add?

Signed by Referee

Name

Date Signed

Education Agent Due Diligence Checklist

Education Agent Name _____ Education agent's head office location _____ Date Assessed _____

Step One

Has the education agent completed the Prospective Education Agent Questionnaire YES NO

Did their responses meet your benchmark to proceed to the due diligence stage YES NO

Does the education agent offer access to new or emerging student groups for

Provider Name _____ YES NO

Does the education agent specialise in a particular field or subject area? YES NO

Is this specialism a good fit for the following provider?

Provider Name _____ YES NO

Does the education agent have a good reputation/experience in the region? YES NO

How has this been confirmed?

Does the education agent have a strong digital presence? YES NO

Has the education agent already sent you students? YES NO

What was the quality of those students?

Where would the following provider sit in this education agent's portfolio of partners?

Provider Name _____ Answer _____

Do their organisational values align with the following provider?

Provider Name _____ YES NO

Assess the value of the education agent based on the completed education agent application form including referee checks (see below). Written evidence of referee checks must be obtained. YES NO

Check education agent staff are listed as certified on the British Council website YES NO

Are they an aggregator or master agent? YES NO

If yes:

Who is responsible for delivering training to the sub-agents? _____ Who ensures brand guidelines are adhered to? _____

Who carries out the due diligence checks on sub-agents? _____ Who ensures GDPR compliance is maintained? _____

How are complaints and feedback managed? _____ Who signs off on the appointment of new sub-agents? _____

Account manager assessment summary

Assessment of all the available evidence on the suitability of the education agent

Name _____ Position _____ Date _____

Step Two

Education agent approved to Contract Stage YES NO If no, please provide for non-approval

Director International Recruitment _____ Date _____

Provider Checklist For New Education Agent Induction

Counselling team

- Introduction to key contacts at provider
- General overview of provider
- Course/programme subject areas
- Course/programme priorities
- Unique or special proposition relative to generic others
— eg advantages of location, unique content of course /programme, specialist facilities
- Market specific entry criteria
(including pre-sessional English, foundation courses, etc)
- Costs – approximate amount in local currency
- How to apply
- Live showcase
- Student wellbeing, support and experience information
- Student and alumni profiles
(ideally from that market)
- Persona case studies – practical examples for counsellors to work through

Finance team

- Simplified version of the General overview of provider
 - Who we are and the financial nature of the relationship with the education agent
- Review of relevant contract clauses
 - Commission amounts
 - Structure of payments
 - Bonus schemes
 - Refunds
- Process for claiming
 - Claiming windows – eg post-enrolment
 - Financial deadlines
 - Invoice requirements
 - Timeframes
 - Appeals Process
 - Key Contacts
- Software integrations (if relevant)
- Access to agent hub/portal (if relevant)

Education Agent Planning Template

Education Agent Name _____

Date of planning meeting _____

Meeting between

Provider Representative Name _____

Education Agent Representative Name _____

Objectives	Activities	Target	Support required/ investment	Lead	Notes	Review Date
Increase profile of Provider X in target market	Online advertising campaign on native language social media platforms	5,000 impressions 500 click- throughs	Latest visual marketing materials from Provider X	Fictional Agent	Full details of content plan, channels, landing pages, etc saved here	01.03.2022
Increase numbers of trained counselling staff in Fictional Agent head office (1/2)	British Council Education Agent Training Suite	100% of head office staff to successfully complete the British Council MOOC (Study UK: A Guide for Education Agents)	None	Fictional Agent		01.07.2022

Contact for issue resolution

Provider Name _____ Job _____

Email _____ Phone _____

Fictional Agent Name _____ Job _____

Email _____ Phone _____

Review Scorecard

Criteria		Target	Actual	Rating	Score	Total
Recruitment & marketing <i>Weighting 40%</i>	Enrolment target			Below Met Exceeded expectation	1 2 3	
	Conversion rate (app to offer)					
	Conversion rate (app to enrol)					
	'Priority programme' enrolments					
	Cost per enrolment (marketing and commission)					
Quality <i>Weighting 20%</i>	Visa success					
	CAS cancellations (after CAS being issued)					
	New-student survey feedback					
Student experience <i>Weighting 20%</i>	Change of agent requests					
	Student complaints					
	Student propensity to recommend agent					
	Business intel, feedback, responsiveness					
Engagement <i>Weighting 10%</i>	Training participation					
	Value-add service					
Risk <i>Weighting 10%</i>	Warnings					
	National Code Audit – Standard 4.2					
Score				Weighted Score		



INTRODUCTION

Purpose

The National Code of Ethical Practice for UK Education Agents (referred to as 'the National Code') sets out the standards and best practice that education agents and aggregator agents, representing UK education providers are expected to adhere to. Born out of the London Statement (2012) and the British Council Good Practice Guide for Education Agents (2013), it is endorsed by many of the UK's peak bodies. Education Agents have contributed to The National Code's development and UK providers have committed to imbedding The National Code into their education agent contracts and quality management practices. It is not in of itself a legal document.

Definitions

Education Agent

A person or organisation that deals directly with prospective international students on behalf of education providers. They are contracted directly or indirectly to deliver a range of services to potential students and the provider. To a student, these services would ordinarily include education counselling, such as course and institution matching, and assistance with academic and visa applications. To a provider, services usually include marketing and promotion services and support in identifying qualified students.

Aggregator Agents

Contracted directly by education providers, an aggregator agent (sometimes referred to as a **B2B Agent**, **Master Agent** or an **Outsourced Agent Management Service**) facilitates the delivery of education agent services to students via a network of education agents (service delivery partners) and providing a one-to-many relationship between a provider and education agents. This is achieved through a technology platform and/or a sub-contracting-type arrangement. Aggregator agents assume responsibility for their service delivery partners' compliance with this National Code.

Qualified Student

A student who intends to enter the country (UK) for academic purposes at the selected provider or package of providers e.g., foundation college to university, as described in their application for study, and meets the requirements stipulated by the Home Office to legitimately study in the UK on the terms set out in their visa. Where a student intends to study a UK course offshore e.g., via a partner/online delivery/provider's offshore campus, they would be considered qualified based on their academic merit alone.

Student Client

A prospective student who agrees (signed agreement) to engage the services of an education agent in support of their academic and visa applications and any ancillary services as per their agreement.

Provider

A recognised UK provider of a course or courses of study that international students may enrol in, not limited to schools, colleges, English schools, foundation providers, universities and institutes.

Ethical Framework

The National Code is based on the underlying ethical framework of the London Statement that requires education and aggregator agents to operate with:

- **Integrity:** being straightforward and honest in all professional and business dealings;
- **Objectivity:** not allowing professional judgment to be compromised by bias or conflict of interest;
- **Professional competence and due care:** maintaining professional knowledge and professional service, and acting diligently;
- **Transparency:** declaring conflicts of interest to all clients, especially when service fees are charged to both the education provider and the prospective student;
- **Confidentiality:** respecting and preserving the confidentiality of personal information, and not releasing such information to third parties without proper authority in-line with UK data protection legislation;
- **Professional behaviour:** acting in accordance with relevant laws and regulations and dealing with clients competently, diligently and fairly; and
- **Professionalism and purpose:** acting in a manner that will serve the best interests of clients and the wider society even at the expense of self-interest; recognising that dedication to these principles is the means by which the profession can earn the trust and confidence of stakeholder groups (individual clients, the public, business and government).

The National Code Standards

The National Code of Ethical Practice for UK Education Agents is made up of five Standards. Each of these Standards contains a range of expected/desirable practices and suggested evidence points.



1. ORGANISATIONAL BEHAVIOUR

Education and aggregator agents commit to professional business governance and practices. You conduct yourselves with due regard to the regulatory conditions in the market(s) in which you operate as well as complying with all applicable national laws, regulations and official policies. Furthermore, you act with integrity and in a manner that reflects positively on the image of the profession, of your partner providers and of the UK education sector as a reliable and trustworthy provider of high-quality education and training.

Expected Practice	Suggested Evidence
1.1. Act professionally, honestly and responsibly	<ul style="list-style-type: none"> • Staff handbook • Staff/education agency certification – British Council Education Agent and Counsellor Training Programme <p>The Training Programme is currently being reviewed and may subsequently change it's title.</p>
1.2. Avoid or declare conflicts of interest and comply with relevant laws and regulations	
1.3. Observe appropriate levels of confidentiality and transparency including declaring any relevant partnerships and affiliations (including with sub-agents/managed agents) to partners and student clients and providing clear protocols for managing these relationships	<ul style="list-style-type: none"> • Archives of client records and agreements for previous 3 years • Protocol/policy documents for managing third parties with demonstrable auditing trail to show they are being used
1.4. Be transparent about which organisations the company formally represent (under contract) and those that they do not	<ul style="list-style-type: none"> • Education agent websites and promotional materials
1.5. Clearly display the company registration/identifiers on websites and advertising materials	
1.6. Use approved marketing communications or gain approval to develop marketing communications on behalf of a provider, to promote providers with whom the company has an agreement	
1.7. Provide a safe environment for their workers	<ul style="list-style-type: none"> • Jurisdiction appropriate health and safety, bullying and harassment, and equality and diversity policies or evidence of appropriate processes in place • Photographs of the office and promotional stands - virtual/physical
1.8. Provide a professional physical/online space for counselling student clients	
Desirable Practice	

2. ETHICAL BUSINESS PRACTICE

Education and aggregator agents maintain the highest standards of ethical business practices. You promote yourselves and your partner providers fairly and without recourse to unfavourable or negative comparisons with other providers, or otherwise employ unfair or unprofessional practice to damage the interests of other providers. You are honest in communicating information about yourselves, your partner providers and your student clients in published, oral or in any other form.

Expected Practice	Suggested Evidence
2.1 Ensure all staff have read and understand the National Code of Ethical Practice for UK Education Agents and the associated business practices of your organisation including being open about commercial relationships (not financial detail) with student clients	<ul style="list-style-type: none"> Staff handbook Staff/education agency certification – British Council Education Agent and Counsellor Training Programme
2.2 Be transparent about which education agent services fall under 'provider pays' (under commission arrangements) and/or 'student pays'	<ul style="list-style-type: none"> Signed written/digital agreements between education agents and student clients that include information about fees, information about themselves and complaints processes Documented systems and protocols for handling complaints
2.3 Disclose the use of marketing incentives to contracting providers and refrain from practices designed to lure prospective students away from competitor organisations	
2.4 Provide clear avenues for handling complaints and resolving disputes including UK partner providers' complaints processes	<ul style="list-style-type: none"> Examples of action taken based on student client and partner provider feedback Documented systems and protocols
2.5 Maintain signed agreements between your education agent company and your student clients	
2.6 Provide accurate information about yourselves that supports comparison of registration, accreditations, professional associations, qualifications and experience without knowingly providing misleading information	<ul style="list-style-type: none"> Documented systems and protocols
2.7 Monitor student client and provider feedback and act where necessary	
2.8 Have in place systems and protocols (including relevantly trained staff) to identify and avoid the submission of fraudulent or misleading student documents to UK providers and visa authorities	<ul style="list-style-type: none"> Documented systems and protocols
2.9 Do not seek to or facilitate students moving between providers to courses of the same or lower QAA level (provider hopping), to gain additional commission.*	
* Where a student has sound reasons for moving, you should inform the existing and future provider and where appropriate work with them to find an agreeable solution.	
Desirable Practice	
Be members of professional associations and networks that promote and support best practice in the recruitment of international students	<ul style="list-style-type: none"> Link to membership list/kite mark

* Note it is not expected that the amount of commission is disclosed; this is commercially sensitive.

Ethical Framework

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- Objectivity:** not allowing professional judgment to be compromised by bias or conflict of interest;
- Professional competence and due care:** maintaining professional knowledge and professional service, and acting diligently;
- Transparency:** declaring conflicts of interest to all clients, especially when service fees are charged to both the education provider and the prospective student;
- Confidentiality:** respecting and preserving the confidentiality of personal information, and not releasing such information to third parties without proper authority in-line with UK data protection legislation;
- Professional behaviour:** acting in accordance with relevant laws and regulations and dealing with clients competently, diligently and fairly; and
- Professionalism and purpose:** acting in a manner that will serve the best interests of clients and the wider society even at the expense of self-interest; recognising that dedication to these principles is the means by which the profession can earn the trust and confidence of stakeholder groups (individual clients, the public, business and government).

The National Code Standards

The National Code of Ethical Practice for UK Education Agents is made up of five Standards. Each of these Standards contains a range of expected/desirable practices and suggested evidence points.



4. STUDENT-CENTRED PRACTICE

Education and aggregator agents advocate for qualified students in their desire to gain admission to recognised, accredited and contracted providers. You act in the best interests of student clients as well as the partner providers and offer advice, counselling and information to students, and where appropriate their parents, in a manner consistent with this Code.

Expected Practice	Suggested Evidence
4.1 Provide realistic and appropriate information that is tailored to the individual student client's circumstances, particularly in relation to language skills, capacity to pay and level of study	<ul style="list-style-type: none"> Examples of student client and family feedback Spot check audit documents of counselling interactions Staff handbook Company equality and diversity policy (for staff and students) or equivalent document
4.2 Support student clients' enrolment journey without prejudice or discrimination, including in relation to their nationality, race, gender, sexual orientation, religion, disability, age, marital or maternity status	
4.3 Act in the best interests of a qualified student	<ul style="list-style-type: none"> Signed written/digital agreements between education agents and student clients that include information about fees, information about themselves and complaints processes Documented systems and protocols for handling complaints
4.4 Proactively and accurately advise student clients of non-genuine providers and areas of sector concern to help them make informed decisions	
4.5 Provide pastoral care and student wellbeing support in line with the education agent's duty of care – for all student clients, but in particular for those under 18 years of age	<ul style="list-style-type: none"> Appropriate governance and document management in place and process/policy regarding document management and security
4.6 Specify the rights and responsibilities of the student client in the destination country including complaints and appeals processes and visa stipulations such as part time work rules	
4.7 Ensure strict confidentiality of personal information and that this information is not shared with a third party unless consent is given, in line with UK data protection legislation	
Desirable Practice	
Publish a company charter on how they will counsel and support student clients	<ul style="list-style-type: none"> Company Charter

5. ORGANISATIONAL COMPETENCE

Education and aggregator agents maintain their staff and service delivery partners knowledge of the UK and of their partner providers, and the skills associated with delivering professional practice with a high degree of competence.

Expected Practice	Suggested Evidence
5.1 All UK focused staff understand relevant legislation and regulations relating to recruiting students to UK providers	<ul style="list-style-type: none"> Staff/education agency certification – British Council Education Agent Training Programme Education agent's/aggregator agent's in-house training records demonstrating that their staff and service delivery partners regularly participate in continuing professional development activities that maintain their up-to-date knowledge
5.2 All UK focused education agent counselling staff have completed UK education agent training	
5.3 At least one UK focused education agent counselling staff per office to have completed the British Council Education Agent Training Programme	
5.4 All UK focused staff participate in regular training from UK partner providers	
5.5 Keep records of staff's UK education focused training (including dates and type)	
Desirable Practice	
Multiple UK focused education agent counselling staff per office to have completed the British Council Education Agent Training Programme	<ul style="list-style-type: none"> Staff/education agency certification – British Council Education Agent and Counsellor Training Programme
All senior counselling staff have completed the British Council Education Advanced Agent Training Programme	